

## **Europe Shrink and Stretch Sleeve Label - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Europe Shrink and Stretch Sleeve Label Market size is estimated at USD 1.64 billion in 2025, and is expected to reach USD 2.00 billion by 2030, at a CAGR of 4% during the forecast period (2025-2030).

The COVID-19 pandemic and the consequent lockdowns have affected industrial activities across the region. However, the disruptions caused in the first four months of 2020 were expected to result in order delays and increased lead times across the sleeve label supply chain until the second quarter of 2021.

The pandemic has also created a short-term supply pressure on sleeve label players, as raw material suppliers have been functioning at lowered efficiencies. Most packaging companies in Europe were not able to manage full production capacities due to lockdowns in many countries.

### **Key Highlights**

- The shelf appeal of a product plays a crucial role in driving its sales, especially in retail stores, and supermarkets. Moreover, with the advent of the 3D modeling technology for packaging, the streamlining of the pre-press process becomes simpler and allows the converter to simulate the appearance of the finished product packaging to brands before they hit the press.
- Further, shrink sleeve labels offer added security and safety for product companies as they cover the container from top to bottom, and incorporate an easy open or guarantee seal on the same label, thereby protecting the contents from being tampered with.
- For example, Brown-Forman Beverages used the Eastman Embrace LV copolyester for shrink film labels, covering the entire 70 cl bottle of Southern Comfort liquor for a limited edition package, which was launched in the United Kingdom. The shrink label includes the neck and cap, acting as a tamper-evident seal and giving the impression of a wrapped gift.

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- Shrink-sleeve labels that are either PVC-based or PETG-based have a density higher than water. Hence, they contaminate the recycled PET stream and deteriorate the quality of recycled PET (rPET) products. This has led to increased efforts for developing new polyolefin film structures that float during washing to enable the separation of the label and bottle materials.
- The European Union banned single-use plastic items in 2021. The member states need to achieve a 77% collection target for plastic bottles by 2025 and 90% by 2029. Also, the law requires plastic bottles to contain at least 25% recycled content by 2025 and 30% recycled content by 2030. Such dynamic changes in regulatory standards, especially the ban on plastic, are expected to have an adverse effect on the shrink and stretch sleeve label market in the region.

## Europe Shrink and Stretch Sleeve Label Market Trends

### PE Segment to Witness Significant Growth

- Polyethylene is the most commonly used material for shrink and stretch wrapping because it is relatively cheap, and can be produced in a wide range of different densities and modified with additives to perform many functions. The vast majority of shrink film is LDPE, and some of the more sophisticated films have blends of LLDPE as well. Sometimes, a small quantity of HDPE material is also added.
- Most market players are launching new labels that offer a wide variety of sustainable solutions to choose from. For instance, in May 2020, UPM Raflatac launched UPM Raflatac Forest Film PE to complement its range of sustainable film labeling solutions. The new PE film label takes UPM Raflatac forward in its quest for a smarter future beyond fossils, decreasing the use of fossil-based virgin raw materials in home and personal care labeling applications.
- Furthermore, Barbier Group, a producer of polyethylene films and recyclers, is fully committed to transition to a more sustainable model. Using recycled polymers in its production process, Barbier Group reduces its carbon impact by reducing its consumption of virgin plastic (fossil fuels). One ton of recycled plastics, when replacing one ton of material from oil, corresponds to a savings of three tons of carbon.
- However, with the decline in the growth of PE, there is a delay in new capacity start-ups. A total of 7.1 million tons of PE were due on stream in the 2020 year, but 2.7 million tons of this was expected to be shifted to 2021 (source: European Commission).

### Beverages to Occupy Significant Market Share

- The use of sleeve-format labels has been growing continuously in the beverage end-user segment. This is primarily driven by the growing competition for consumer acceptance.
- There is a growing trend of use of plastic bottles and aluminum cans for beverage products. Aluminum cans are increasingly using shrink sleeves, replacing direct printing. Sleeves provide the brand volume and versioning flexibility. Sustainability, shelf impact, functionality, and digital printing are expected to drive innovation in the use of labels in the beverage industry in the future.
- In order to address sustainability concerns, many companies are launching sleeves in new material formats. Sleever International recently launched the LDPET, a new product for the better recovery of used PET bottles.
- In February 2021, CCL Label launched EcoStretch, a sustainable stretch sleeve option, which, after use, would be recycled at the company's facility in Austria and returned to the manufacturing process in an entirely closed production loop. The recycling facility would be located at CCL's Voelkermarkt site in Austria, a hub for the production of stretch and shrink sleeves mainly produced for the dairy, beverage, and home care industries.
- Further, according to the Union of European Beverages Associations (UNESDA), in 2019, the average citizen of an EU member state consumed about 94.7 liters of soft drinks annually. Leading industrialized countries, such as the United Kingdom, see a much

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higher consumption of soft drinks than the EU average. In 2010, 238.2 liters of non-alcoholic drinks were consumed per person in the European Union, which increased to 243.9 liters per person by 2019. Such instances may lead to substantial market growth.

## Europe Shrink and Stretch Sleeve Label Industry Overview

The European shrink and stretch sleeve label market is moderately fragmented. Innovation and ease in deployment and usage, which leads to increased end-to-end customer satisfaction, have been the key factors driving the product innovation and strategies among the market players. The market players are adopting powerful competitive strategies, such as product development, investments, and acquisitions, to remain relevant in the market.

### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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